

**SUMTER COUNTY BOARD OF COMMISSIONERS
EXECUTIVE SUMMARY**

SUBJECT: Employee Manual Revisions

REQUESTED ACTION: Approve the revisions to the Employee Manual to increase the Educational Assistance Reimbursement amount to \$2000.00 and define the requirements for reimbursement effective July 1, 2010 (Staff recommends approval)

☐ Work Session (Report Only) **DATE OF MEETING:** 6/8/2010
☒ Regular Meeting ☐ Special Meeting

CONTRACT: ☒ N/A

Effective Date: _____
Managing Division / Dept: _____

Vendor/Entity: _____
Termination Date: _____

BUDGET IMPACT: _____

☐ Annual
☐ Capital
☒ N/A

FUNDING SOURCE: _____

EXPENDITURE ACCOUNT: _____

HISTORY/FACTS/ISSUES:

The Personnel Review Team (PRT), made up of Division or Department Head level positions representing each Division, meets monthly to address concerns arising from administration of the Employee Manual and other employee related matters.

The PRT met and discussed the need to revise the current Educational Assistance Reimbursement Policy (EARP) to increase the reimbursable amount, establish tiers of reimbursement, and to include textbooks as a reimbursable expense. The objective of this policy is to "To enhance service to the citizens of Sumter County by providing encouragement and financial assistance to employees who successfully complete courses of instruction which may improve their effectiveness in their current positions or which may enable them to attain promotional advancement within their present career field or other career fields of Sumter County Government." The current funding amount of \$1000.00 does not allow for a course load to reach the desired Associate or Bachelor degree in a reasonable time. The current policy also does not allow for reimbursement of textbook expenses. The cost of textbooks is very expensive and is often an impediment for employees to continue their education. The PRT also would like to tie the reimbursement to performance measures, therefore a tiered reimbursement is recommended. Reimbursement of the funds for all Associate and Bachelor level courses will be not only based on the proper documentation but also 100% reimbursement is provided if an "A" is achieved, 85% reimbursement is provided if a "B" is achieved, 75% reimbursement is provided if a "C" is achieved, and no reimbursement is provided for any grade lower than a "C". Reimbursement of funds for all Master level courses will be not only based on the proper documentation but also 100% reimbursement is provided if an "A" is achieved and 85% reimbursement is provided if a "B" is achieved, no reimbursement is provided for any grade lower than a "B". The revised policy (attachment A) provides for these recommended revisions.

The PRT considered requiring all Master's degree students to receive a "B" or higher for reimbursement, however a review of several Universities (attachment B) indicated that they accepted a "C" as a passing grade. The PRT agrees that achieving a Master's degree should have stiffer requirements, but felt that our requirements should not be stricter than the University requirements.

The County Administrator recommends approval of the policy which is more restrictive than the PRT recommendation and is revised to reflect his recommendation.

Attachment "A"
Effective July 1, 2010

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7.035 EDUCATION ASSISTANCE REIMBURSEMENT PROGRAM

I. PURPOSE

To provide a policy and procedure for reimbursing educational costs to employees who successfully complete approved courses of instruction.

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II. OBJECTIVE

To enhance service to the citizens of Sumter County by providing encouragement and financial assistance to employees who successfully complete courses of instruction which may improve their effectiveness in their current positions or which may enable them to attain promotional advancement within their present career field or other career fields of Sumter County Government. Funds for this program will be subject to approval each fiscal year by the Board of County Commissioners.

III. POLICY

A. Eligibility - All regular full-time employees who have completed their introductory period are eligible for this benefit subject to the advanced written approval of the County. Participation by the employee will be on a voluntary basis and the time spent in attending classes is not allowed to count as hours worked for compensation purposes. There may be instances where the educational aid cannot be provided due to budgetary constraints. In a situation of limited funding, applications earliest filed will be considered. The employee must:

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1. Be on active full-time employee status at the time of application and upon completion of classes. Note: An employee will not be reimbursed if he leaves the employ of the County before completing the course, or in case of course completion, before reimbursement can be processed.
2. Establish eligibility for reimbursement prior to the first day of class.
3. Successfully pass the course(s) and present a certificate or proof of completion. A passing grade for reimbursement purposes shall be considered a grade of "C" or higher or "Pass" when used in lieu of a letter grade for all Associate and Bachelor level courses. A passing grade for reimbursement purposes shall be considered a grade of "B" or higher or "Pass" when used in lieu of a letter grade for all Master level courses

B. Types of Courses Covered

1. Covered courses must have a relationship to the employee's present job, possible future assignment or promotion, or a degree program, which is related to the employee's job.
2. The course must be offered at an accredited secondary school, college or university, or business school, technical institute or trade school.
3. Educational assistance will apply only to those courses for which the employee is not receiving other total financial aid such as fellowships, scholarships, private foundation grants, and governmental educational assistance (GI Bill). Where educational expenses are paid in part, an employee may apply for reimbursement for those educational expenses not otherwise covered.
4. In the event that a class is cancelled or rescheduled, an alternate class may be selected. The employee must repeat the approval process within two weeks after the course start date.
5. Correspondence courses may only be approved in the absence of any available traditional classroom courses or other unusual circumstances. Correspondence course reimbursement requires approval of the County Administrator. Any approved correspondence course should be fully accredited and comparable in content to that of a regular university level course.
6. Expenses for management seminars, professional meetings, and other external seminars/training are not reimbursable under this policy. While continuing education is encouraged, such training is provided for under the department's budget at the discretion of the Department Head or Division Director.

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C. Attendance at Course

1. Course work must be accomplished outside of employee's normal work schedule unless Division Director approves the use of accumulated annual leave or modified work schedule when classes are offered at no other time and arrangements can be made to the satisfaction of the supervisor.

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D. Benefits

1. Reimbursement will be made for satisfactory completion of all Associate and Bachelor level courses as follows:

A or "Pass" = 100%

B = 85%

C = 75%

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Reimbursement will be made for satisfactory completion of all Master level courses as follows:

A or "Pass" = 100%

B = 85%

2. Approval will be limited to a maximum of \$2000.00 per calendar year per employee.
3. Reimbursement will be made for the per hour costs of a class including tuition, matriculation, textbooks, and other required fee components and lab fees only. Reimbursements will not be made for application or registration fees, materials, additional parking fees, or other course fees and costs.
4. The County will reimburse employees only to the extent that they are not reimbursed through other Federal, State, or local programs.
5. Reimbursements may be taxable subject to current IRS regulations.

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E. Service Obligation

1. Employees who participate in the program must agree to remain in the employ of the County for a least one (1) year following course completion. Employees who retire, resign, or are involuntarily terminated within the one (1) year period shall reimburse the County for educational benefits paid to them for courses completed during the preceding twelve (12) months. Reimbursement shall be by cash payment or by withholding any monies due at the time of separation.

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PROCEDURES

- A. An application should be completed and approved prior to registering for the course but no later than the first day of class.
- B. An application for each course is to be submitted to the Division Director or his designee for evaluation and recommendation.
- C. The application will then be forwarded to the Board's Human Resources Department. The Board's Human Resources Department will date/time stamp application and accept for further processing. The application will be approved or disapproved in accordance with the eligibility criteria, reimbursement limitations, and availability of funds.
- D. A copy of the approved or disapproved application will be returned to the Division Director or his designee and the employee within one week.
- E. Upon completion of the course(s), the employee shall submit proof of grade and documentation of educational costs to the Board's Human Resources Department. Documentation of educational costs must be

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submitted to the Board's Human Resources Department within thirty (30) days of the date of notice of grade. If the notice of grades is not dated, the date of course completion will be used to calculate the thirty (30) day period.

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F. If the conditions for reimbursement have been met, the Board's Human Resources Department shall submit documentation to County Finance for payment to the employee no later than thirty (30) days after submission of documentation.

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G. Employees must pay tuition and other costs directly to the educational institution.

Attachment "B"

Graduate Studies Grading Systems

FSU –

A graduate student is not eligible for conferral of a degree unless the cumulative grade point average is at least 3.0 in formal graduate courses. No course hours with a grade below "C–" will be credited on the graduate degree; all grades in graduate courses except those for which grades of "S" or "U" are given or those conferred under the provision for repeating a course will be included in computation of the average. All conditions of admission must be met; in addition there are usually other departmental requirements which must be met.

UF –

The only passing grades for graduate students are A, A-, B+, B, B-, C+, C, and S. C+ and C grades count toward a graduate degree if an equal number of credits in courses numbered 5000 or higher have been earned with grades of B+ and A, respectively. Grade points are not designated for S and U grades; these grades are not used in calculating the grade-point average. All letter-graded courses taken as a graduate student, except 1000 and 2000 level courses, are used in calculating the cumulative grade-point average (GPA). Letter grades of C-, D+, D, D- or E are not considered passing at the graduate level, although the grade points associated with these letter grades are included in grade point average calculations.

USF –

Academic Standards and Grades

Minimum University Requirements

In Good Standing

To be considered a student in good standing, graduate students must

- Maintain an overall minimum grade point average (GPA) of 3.00 (on a 4.00 scale) in all courses taken as a graduate student, and
- Maintain an overall minimum grade point average (GPA) of 3.00 (on a 4.00 scale) in all courses taken in each of the student's degree-seeking programs.

No grade of C - or below will be accepted toward a graduate degree. Students must meet the requirements to be in good standing to graduate. All "I" and "M" grades must be cleared for graduation to be certified. Students who fail to maintain good standing may be placed on probation or academically dismissed.